

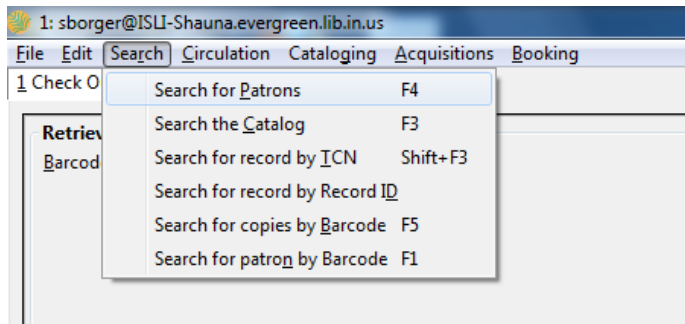


Chapter 2 - Registering Patrons

Registering Patrons/Staff

To register a new patron, we will begin by accessing the Searching the database to make sure they do not already have an Evergreen Indiana library card.

Search for the patron's name (F4) by navigating to Search and choosing Search for Patrons.



Make sure to choose *Everywhere* and check the box next to *Include inactive patrons?* so as not to leave any possible duplicate records out of your search results.

1: sborger@ISLI-Shauna.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions Booking

Patron Search

No Patron Selected

Search for Patron

Include inactive patrons? ☒

Limit results to patrons in **Everywhere**

Last Name:

First Name:

Middle Name:

Alias:

Email:

Phone:

ID:

QPAC Login:

Barcode:

Address 1:

Address 2:

City:

ZIP:

Filter by Permission Profile:

Search

Clear Form

Barred	Date of Birth
f	1991-01-01 12:0 AM
f	1991-01-01 12:0 AM

If accounts with similar or identical names are returned in the search results, the identification and address information of the applicant should be compared to the information in the existing accounts. In the event there is no identification information in the existing account, the home library should be contacted to ascertain if there is non-electronic “legacy” data that did not migrate but which is still retained at the library that may help resolve whether there is or is not an account already in the applicant’s name.

If there is no previous library card, proceed with registering the patron by navigating to “Circulation” menu and selecting “Register Patron.”

Evergreen Indiana Circulation Training Manual

Chapter 2 - Registering Patrons/Staff

The screenshot shows a web browser window with the address bar displaying '3: admin@BR1-sborger_ACQ.training.evergreen.lib.in.us'. The browser's menu bar includes 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Acquisitions', and 'Booking'. The page title is '2 Register Patron'. The form itself has a 'Reload' button at the top left and 'Debug' and 'Print Page' buttons at the top right. The form fields are organized into two columns. The left column contains: Barcode (with a yellow warning icon), OPAC/Staff Client User Name (with a yellow warning icon), Password (containing '5609'), Verify Password (containing '5609'), First Name (with a yellow warning icon), Middle Name, Last Name (with a yellow warning icon), Suffix/Title, OPAC/Staff Client Holds Alias, Date of Birth (with a yellow warning icon and example '1970-01-31'), Juvenile (checkbox), Primary Identification Type (with a yellow warning icon and dropdown arrow), Primary Identification (with example '1234-56-7890'), Parent/Guardian, Email Address, Daytime Phone (with example '123-456-7890 or 123-456-7890 x123'), Evening Phone (with example '123-456-7890 or 123-456-7890 x123'), Other Phone (with example '123-456-7890 or 123-456-7890 x123'), Home Library (dropdown menu with 'BR1' selected), Main (Profile) Permission Group (with a yellow warning icon and dropdown arrow), Privilege Expiration Date (with a yellow warning icon and example '1970-01-31'), Internet Access Level (dropdown menu with 'Filtered' selected), Active (checkbox checked), Barred (checkbox), Is Group Lead Account (checkbox), Claims-returned Count (spinner with '0'), Claims Never Checked Out Count (spinner with '0'), and Alert Message. The right column contains buttons: 'Replace Barcode', 'Reset Password', 'Save', 'Save & Clone', and a link 'Show Only Required Fields'.

User Identification

The first step to registering a patron is to scan or enter the barcode from the library card you are assigning the new patron. This can be done manually or using a barcode scanner.

After entering the barcode and hitting the tab key, the OPAC/Staff Client username field will automatically populate with the barcode. This can be changed by the circulation staff, if the patron has a username they would like to use, or it can remain the barcode.

A 4-digit Password is automatically assigned to the patron. This will be their temporary password to access the “My Account” section of the Online Catalog. After successful registration of a patron, the staff member will be unable to view the Password for confidentiality purposes. If a patron does not remember their Password at a later date, the staff member must choose Reset Password, write it down, save the patron record and give the new Password to the patron.

Patron registration definitions

Enter patron information in capital letters according to the Evergreen Indiana Circulation Procedures.

Barcode (Required): Library Card Barcode Number

OPAC/Staff Client User Name (Required): Same Number as Above Field

Password (Required): Generated by System. Patron uses this number to log into their My Account in the OPAC.

Verify Password (Required): Same as Above Field

First Name (Required): Patron's First Name

Middle Name (Optional): Patron's Middle Name

Last Name (Required): Patron's Last Name

Suffix/Title (Optional): Senior, III

OPAC/Staff Client Holds Alias (Optional): This can be a nickname applied to a group of people for whom services need to be grouped together. Example: Bookmobile patrons at each location.

Date of Birth (Required): Patron's Date of Birth entered with the following format: YYYY-MM-DD

Juvenile (Optional): Check if you want to indicate that the patron is a juvenile.

Primary Identification Type (Required): Driver's License or Other

Primary Identification (Required): Driver's License or Other ID number

Parent/Guardian (Optional): If the patron is a juvenile and you want to link their account to a patron or guardian's account.

Email Address (Optional but desired): Patron email address. NOTE: Please enter the email address in regular caps.

Daytime Phone (Optional): Patron phone number

Evening Phone (Optional): Patron phone number

Other Phone (Optional): Patron cell phone or other residence phone number

Home Library (Required): Choose your library abbreviation from the dropdown menu.

Main (Profile) Permission Group (Required): Patron borrowing privilege profile. See the Evergreen Indiana Circulation Procedures for more information about assigning profiles.

Privilege Expiration Date (Required): Becomes automatically populated upon choosing a patron profile. See the Evergreen Indiana Circulation Procedures for more information about how long each card is valid.

Internet Access Level (Optional): Only applicable if library uses a computer login software such as PC Cop.

Active: Default is checked. If a patron account expires, staff members can un-check this option to prevent the patron information from being included in statistics on active patrons.

Barred: Default is un-checked. Staff members can manually check this box to prevent a patron from checking out. An alert will also be displayed in the patron account which will notify staff members that the patron has been barred.

Is Group Lead Account: Default is un-checked. Staff members can check this box and Save & Clone the account to create a subordinate patron account. Those accounts will then be linked.

Claims-Returned Count: Staff members can mark an item Claims Returned and it will be reflected in the patron account.

Claims Never Checked Out Count: Staff members can mark an item Missing and it will be reflected in the patron account.

Alert Message: Any text entered here will display as soon as the patron account is opened.

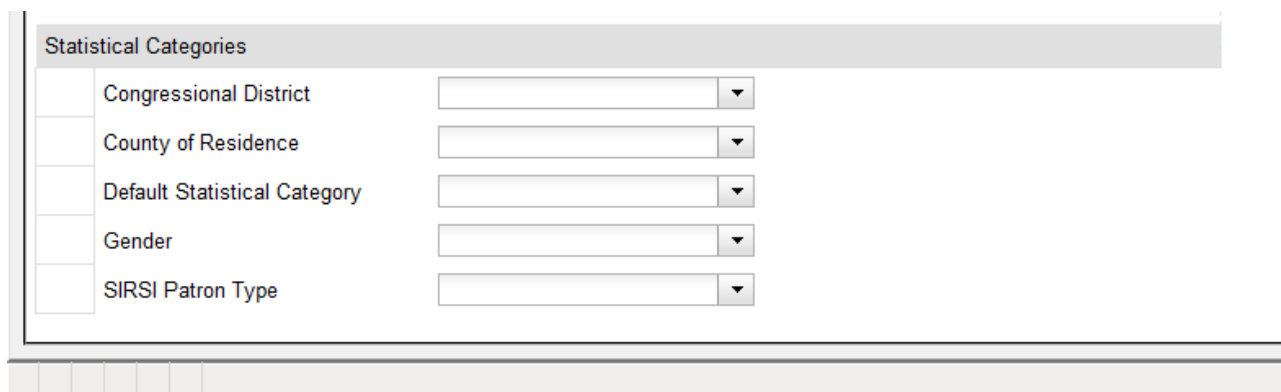
Hold is behind Circ Desk: Staff members can manually check this box and an alert will be reflected in the patron account.

Address: Please enter address information in all caps.

Statistical Categories

Statistical Categories must be set by each library from the Local Administration screen in order to take advantage of gathering the information when registering staff. See Reports Module, Statistical Categories.

Circ staff can chose what StatCats to place patrons into based on guidelines laid out by their particular library.



Statistical Categories	
Congressional District	<input type="text"/>
County of Residence	<input type="text"/>
Default Statistical Category	<input type="text"/>
Gender	<input type="text"/>
SIRSI Patron Type	<input type="text"/>

Surveys

Surveys can be set on a Consortium wide basis, or on a library by library basis.

From this screen, Circ Staff can record patron's answers to any surveys in progress at that time.

Voter Registration :	
Are you registered to vote?	Yes <input type="button" value="v"/>
Would you like to register today?	No <input type="button" value="v"/>

Finishing

The last step to registering a patron is "Finish"

File Edit Search Circulation Cataloging Acquisitions Booking Admin Help

1 Register Patron

Reload Debug Print Page

Barcode Replace Barcode

OPAC/Staff Client User Name

Password 9560 Reset Password

Verify Password 9560

First Name

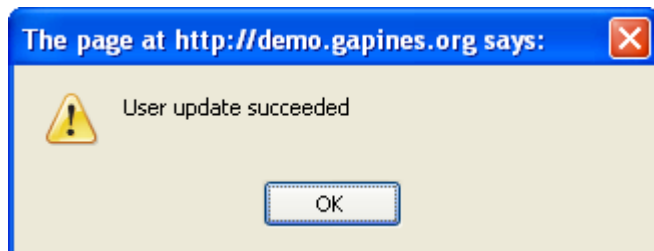
Save Save & Clone

[Show Only Required Fields](#)

Staff can Save, Clone or Cancel the registration.

Typically, Save will be the choice. One circumstance where you might "clone" a user is if a mother and daughter come in to receive a library card. You can create the mother's account and "clone" her account to automatically populate fields like addresses and phone numbers to save time. Cloning also groups all clones of that particular user as children belonging to the lead account.

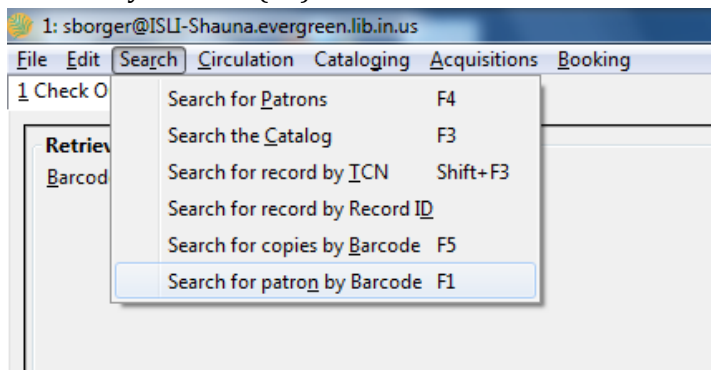
After clicking "Save User" you will see the following message, signifying that the user has been created successfully.





OPAC Password Resets

Pull up the patron account by either searching for the patron's name (F4) or pull up the patron's account by barcode (F1).



Click on the Edit button on the top right-hand side of the screen. The Reset Password button is located on the right of the Password box. If you click the Reset Password box, another random 4-digit password will be assigned to the patron. Make sure to Save the changes by clicking the Save button and writing down the patron's new Password, as the Password will no longer display after you click the Save button.

	Refresh	Check Out	Items Out	Holds	Bills	Edit	Messages	Other
		0	1/1	\$ 5.50				

	Barcode	OPAC/Staff Client User Name	Password	Verify Password
	21951000989565	21951000989565		

Buttons: Replace Barcode, See All, Save, Save & Clone, Reset Password

Links: Show Only Required Fields, Show Suggested Fields



Reissue Patron Library Cards

Pull up the patron account by searching for the patron's name (F4).

Click on the Edit button in the Patron Account on the top right-hand side of the screen. The Replace Barcode button is located on the right-hand side of the Barcode box. Click Replace Barcode and then scan the new barcode number into the first box. *TIP: If you hit the tab key, the OPAC Staff Client User Name will auto-fill and you won't need to type or scan it again.* Make sure to Save the changes by clicking the Save button.

NOTE: The old barcode is NOT freed up for use with another patron. It remains attached to the patron until they are purged from the database manually.



Merging Patron Accounts

Often, after a library migrates to Evergreen Indiana, they will find that many of their patrons have duplicate records in the patron database with different borrowing privileges. Library staff should create a Patron Record Merge Request if the Patron Accounts have matching patron information and appear to be the same individual but have different borrowing privileges.

NOTE: If a patron already has a reciprocal borrower, student or computer user patron profile at another Evergreen Indiana library but they live in your library district, you can simply follow the instructions in the Evergreen Indiana Circulation Procedures and assign the patron a new library card, home library and user or group profile. There is no need to create a new account and merge the two.

After assessing whether or not the accounts should be merged, download the Merging Patron Form and fill in the information for each patron. If one or more of the accounts are not at the same library, both (or all) member libraries must consent to the merging of the records. It is the library's responsibility to get authorization for the merge and enter the information on the excel spreadsheet.

Instructions for completing the Patron Record Merge Request

Column A, B, and C list the barcodes that will be merged (deleted) into the resulting barcode. The final surviving barcode should be listed in Column D. **The resulting barcode should never be listed in any column other than Column D.**



Deleting Patron Accounts

Inactive patron accounts that do not reflect fines or fees, items checked out or claims returned activity will be purged one (1) year from the date of being last used. Member libraries are required to review patron records and mark records “inactive” or delete the patron’s account if expired or unused by the patron during the previous twelve (12) months. LocalAdmins may delete patrons when the home library of the patron matches the local library of the LocalAdmin. LocalAdmins may also grant this permission to other staff members so they will have the ability to delete patrons.

Open the patron account to be deleted and assess whether the patron has open transactions on their account. If there are no open transactions on the account, navigate to Other. Then choose Delete Patron Account.

NOTE: You must click the Check here to confirm this action box whether you choose Delete Account or Cancel Deletion.

The following screen will display after the Delete is complete:

Evergreen Indiana Circulation Training Manual

Chapter 2 - Registering Patrons/Staff

1 Patron Search 2 Patron: 1946251-PURGED-2011-10-31 09:26:59.610398-04, 1946251-PURGED-2011-10-31 09:26:59.610398-04 x

1946251-PURGED-2011-10-31 09:26:59.610398-04, 1946251-PURGED-2011-10-31 09:26:59.610398-04 Refresh Check Out Items Out Holds Bills Edit Messages Other

0 0/0 \$ 0.00

(In-Active)

Status

Users
EG-IN
Internet Filtered
Expires on 2011-10-31
Last updated on 2011-10-31

Holds: 0
Available: 0
Bills: \$ 0.00
Check Outs: 0
Overdue: 0
Long Overdue: 0
Claimed Returned: 0
Lost: 0
Non Cataloged: 0

ID and Contact Information

Library Card: 2628592417
ID 1: Drivers License
ID 2:
Holds Alias:
Date of Birth: 2010-01-01

Day Phone:
Evening Phone:
Other Phone:

OPAC Login: 1946251-PURGED-2011-10-31 09:26:59.610398-04
Email:

Mailing Address

(Copy/Print)

Physical Address

(Copy/Print)

Alert

STOP

Patron account is INACTIVE.

Press a navigation button above (for example, Check Out) to clear this alert.

A patron may return to your library with the library card associated with the deleted account. If you attempt to retrieve the patron account in the Checkout screen, you will receive a message which notifies you that the barcode was not found. At that point, you can search Everywhere in the patron database for the patron. If you still do not find the patron account, notify the patron that their account has been purged due to inactivity in accordance with State Library Law. You will need to ask for identification and register the patron again according to the Evergreen Indiana Circulation Policy and Procedures as you will not be able to access the patron account.

1 Patron Search 2 Patron: 1946251-PURGED-2011-10-31 09:26:59.610398-04, 1946251-PURGED-2011-10-31 09:26:59.610398-04 3 Check Out

Retrieve Patron

Barcode: 2628592417 Submit

Barcode 2628592417 not found.

Evergreen Indiana Circulation Training Manual

Chapter 2 - Registering Patrons/Staff

No Patron Selected

Merge PatronsSearch FormRetrieve Patron

Search for Patron

Include inactive patrons?☒

Limit results to patrons in: Everywhere

Last Name:

First Name:

Middle Name:

Alias:

Email:

Phone:

ID:

QPAC Login:

Barcode:

Address 1:

Address 2:

City:

ZIP:


Filter by Permission Profile:

Search

Clear Form

BarredDate of BirthLast NameFirst NameMiddle NameLibrary Card: Barcode

The page at http://mig.evergreen.lib.in.us says:

No patrons found matching search criteria.

OK

2-12